



Requirements And Instructions For Completing An Application For A Zero Emission Vehicle Fleet Incentive Grant

FALL/WINTER 2002 SOLICITATION

Applicant, Fleet and Vehicle Eligibility Requirements

Applicant, fleet and vehicle eligibility requirements are specified in the program guidelines approved by the California Air Resources Board (Board or ARB) on April 25, 2002, and released by ARB staff in December 2002. The program guidelines are available from the Program Manager (See contact information below) or on the Internet at <http://www.arb.ca.gov/msprog/zevprog/fleetzip/fleetzip.htm>. The requirements include, but are not limited to, the following:

1. The applicant must be a public agency (federal, state or local), non-profit organization, business, corporation, sole-proprietor, partnership, trust or estate.
2. The applicant must operate, at the time of application submittal, a fleet of two or more vehicles or the applicant will be allocating the vehicles to a fleet operator other than the applicant. The other fleet operator must meet applicant eligibility requirements and have two or more vehicles in their fleet at the time of application submittal.
3. Project vehicles must be garaged and/or operated in an area that has not attained the state's health based air quality standards for ozone.
4. Project vehicles must be operated primarily in communities disproportionately impacted by poor air quality, including low-income communities and communities of color.
5. Project vehicles must be new vehicles and models on the list of eligible vehicle models for ZEV Fleet incentive grants.
6. The purchase or lease date of the project vehicles must occur after May 1, 2002. The applicant must accept delivery of the project vehicles within 365 days of the date of grant approval or on or before June 30, 2004, whichever is earlier.
7. Vehicles already receiving a grant through the ZEV Incentive Program (ZIP) I or ZIP II, may receive a grant through the Fleet ZIP however it will be reduced by the amount received through ZIP I or ZIP II.
8. The project vehicles must be registered with the California Department of Motor Vehicles for use in California.

Application Description and Submittal Instructions

The *Application for A Fleet Zero Emission Vehicle Fleet Incentive Program (Fleet ZIP) Grant* consists of two forms: Applicant Information and Project Proposal (Form A) and Supplementation Information (Form B).

All applicants must complete and submit Form A. Applicants must submit Form B if any one of the following circumstances is applicable:

- The applicant is a federal or state agency.

- The proposed project consists of 11 or more vehicles.
- Proposed project vehicles will be allocated to a fleet operator other than the applicant.

Prospective applicants are encouraged to consult with the ZEV Fleet Incentive Grant Program Partner in their area or the Air Resources Board Program Manager prior to submitting an application. To be considered for the Fleet ZIP grants, an applicant must submit one original and signed to the Program Manager during an announced solicitation period. For the winter 2003 Solicitation, applications will be accepted between January 1, 2003 and March 3, 2003.

Fleet ZIP Eligibility and Project Ranking

The table describes the Fleet ZIP eligibility and project ranking.

| Criteria | Project Eligibility Requirements | Project Evaluation Criteria |
|-----------------------------------|---|------------------------------------|
| Applicant | Yes | |
| Eligible Fleet | Yes | |
| Nonattainment Area | Yes | |
| New Eligible ZEV | Yes | |
| Project Administration* | Yes | |
| Environmental Justice Criteria | Yes | |
| Minimum Eligibility Points | 40 | |
| Public Education | | 20 |
| Environmental Justice Criteria ** | | 10 |
| Vehicle Miles Traveled | | 10 |
| Project Partnerships | | 10 |
| Vehicle Use/Application | | 10 |
| | 40 | 60 |
| Total Points = 100 | | |

* Fleet projects only

** Environmental justice criteria is a Project Eligibility Requirement, however applicants can receive additional points based on the extent the vehicles are used in these areas.

All applications that meet the minimum Project Eligibility Requirements will be evaluated using the Project Evaluation Criteria. All projects have a potential score of 100. All applicants meeting the Project Evaluation Criteria are given a beginning score of 40. The Project Evaluation Criteria can provide up to 60 additional points.

Projects that attain a minimum score of 70 are eligible for a grant, contingent upon execution of a Grant Agreement and submittal of required documentation. However, if the number of projects exceeds funding availability, then grants will be allocated to the highest scoring projects. Conversely, if there is more funding than projects that attain a score of 70, then projects with a score of 55 or better will be eligible for a grant.

Grant Payments

If your application is approved, you will receive a Grant Agreement to sign. The Grant Agreement will set aside the funds for your project. At the time you lease or purchase your vehicles, simply fill out the Vehicle Payment Request Form, and we will make arrangements for your grant payment. Grants are paid in full at the time we receive the required documentation including proof of lease/purchase and vehicle registration information.

Applicants may receive the grant directly or may assign the grant to a participating lessor or purchasing agent. If the grant is assigned, the participating lessor or purchasing agent would receive the entire grant amount directly from the Fleet ZIP Program Manager. This will allow the lessor to reduce the lease or purchase price of the qualifying vehicle by the entire grant amount, giving you lower monthly lease payments or a lower purchase price. To assign the grant amount, the applicant would include the Assignment of Fleet Zero Emission Vehicle Incentive Program with the Payment Request Form. This grant may be taxable, so please contact your tax professional or the Internal Revenue Service for additional information.

It should be understood that execution of the Grant Agreement does not obligate the applicant to purchase or lease vehicles should they determine for any reason not to implement the project. In addition, applicants can purchase or lease vehicles in increments, or purchase or lease a smaller number of vehicles than approved in the executed Grant Agreement. Under no circumstances, however, can an applicant receive funds in excess (or for a greater number of vehicles) than in the executed Grant Agreement.

Form A Instructions

In Form A, the applicant is required to complete and provide all requested information:

Section A. Applicant Information

Please note the applicant eligibility requirements described above.

- ☐ Applicant: Include the name or title of your agency or organization
- ☐ Contact Person: Provide the name of the person that should be contacted regarding the ZEV Fleet Incentive Grant
- ☐ Type of Applicant: Check the appropriate box. The local government agency category includes regional agencies, special use districts and school districts.
- ☐ Taxpayer Identification Number: See Privacy Statement below.
- ☐ California Business License: See Privacy Statement below

Section B. Project Proposal Summary

- ☐ Total Grant Amount Requested: This is the number of proposed project vehicles multiplied by the amount of money requested for each vehicle.
- ☐ Primary Type of Vehicle Application/Use: Please check the appropriate box. Off public roads refers primarily to roads or areas where vehicles are not required to be registered with the California Department of Motor Vehicles to operate. Such roads or areas may be at

business and industrial parks, college campuses, gated residential communities, airports and military bases.

- ☐ Number of light-duty vehicles in existing fleet: How many vehicles are in your fleet or the fleet where the project vehicles will be placed. After providing the total, please break it down by the number of gasoline or diesel vehicles, alternative fuel vehicles and battery electric or hydrogen vehicles. Light-duty vehicle refers to passenger cars and trucks.

Section C. Proposed Garaging Location(s), Service Area and Community Benefit Information

- ☐ Garaging Location(s) of Project Vehicles: Provide where the proposed project vehicles will be garaged. Garaging location is typically where the charging infrastructure is located and where vehicle charging will take place. Also include whether or not each garaging location is located in an environmental justice (EJ) area. To find out if the garaging location is located in an EJ area, contact the Program Partner in your area or the ARB Project Manager.
- ☐ If the garaging location is not located in an EJ area, you may propose alternate criteria. Please attach supporting documentation.
- ☐ Will project vehicles replace existing light-duty vehicles: If project vehicles will replace vehicles other than light-duty vehicles, describe vehicles replaced in the area provided under Summary of Proposed Project.

Section D. Proposed Project Vehicle Information and Grant Requests

- ☐ Provide the make, model and year, number of vehicles, whether you plan to purchase or lease the vehicle(s) and the number of months you plan on leasing the vehicle(s), the estimated cost per vehicle and the grant amount requested per vehicle.

Form B Instructions

As stated earlier, applicants must submit Form B if any one of the following circumstances is applicable:

- The applicant is a federal or state agency.
- The proposed project consists of 11 or more vehicles.
- Proposed project vehicles will be allocated to a fleet operator other than the applicant.

Provide the name of the Applicant and the contact person's name and telephone number. Also mark the appropriate box that describes why you are completing Form B. If you choose the third box "Proposed project vehicles will be allocated to a fleet operator other than the applicant," provide the number of entities you are planning to place vehicles.

Section B. Information on Vehicles Allocated to Other Entity (*Complete a separate sheet for each entity*)

- ☐ Provide information on the entity where the vehicles will be placed where the vehicles will be garaged and project vehicle allocations. Please refer to the instructions for completing Sections D and C for Form A. Please complete a separate sheet (front and back) for each entity you are planning to place vehicles.

PRIVACY STATEMENT

Section 7(b) of the Privacy Act of 1974 (Public Law 93-5791) requires that any federal, state, or local governmental agency which requests an individual to disclose his/her social security account number shall inform that individual whether that disclosure is mandatory or voluntary, by which statutory or other authority such number is solicited, and what uses will be made of it.

The State of California requires that all parties entering into business transactions that may lead to payments from the State must provide their Taxpayer Identification Number (TIN) as required by the State Revenue and Taxation Code, Section 18646 to facilitate tax compliance enforcement activities and to facilitate the preparation of Form 1099 and other information as required by the Internal Revenue Code, Section 6109(a). The TIN for individual and sole proprietorships is the Social Security Number (SSN).

It is mandatory to furnish the information requested. Federal law requires that payments for which the requested information is not provided be subject to 31% withholding and state law imposes noncompliance penalties of up to \$20,000.

You have the right to access records containing your personal information, such as your SSN. To exercise that right or if you have any questions regarding this Privacy Statement, please contact the Program Manager of the Statewide Zero Emission Vehicle Incentive Grant Program at (866) 808-0189.

Contact Information

Statewide ZEV Fleet Incentive Program
California Air Resources Board, MSCD/ZEV
P.O. Box 2815, Sacramento, California 95812
General Information Line: 1-800-END-SMOG

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